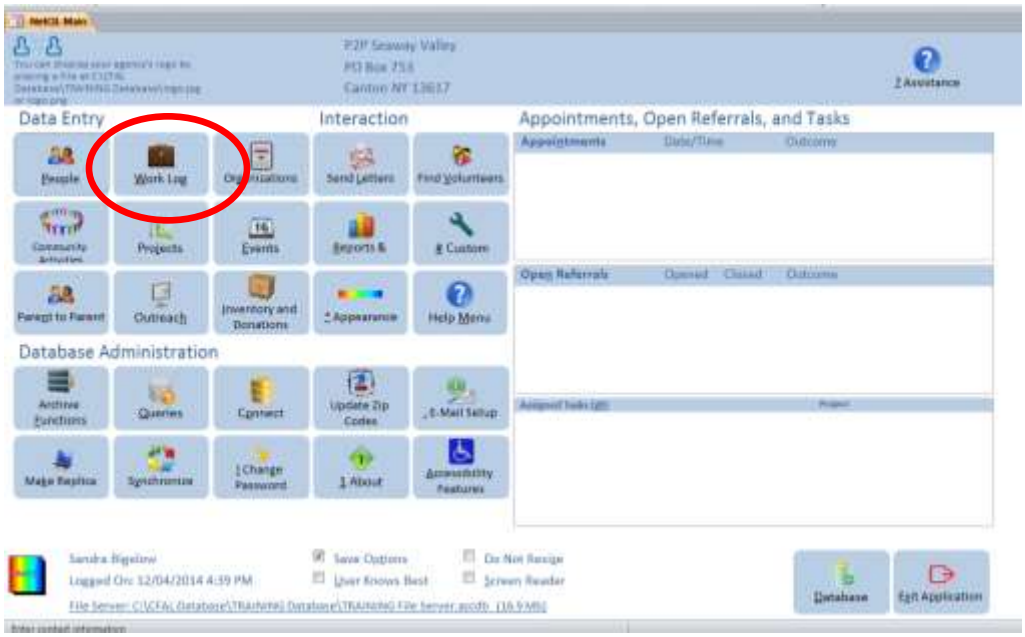
3 Work Log

Any work that is not a one-to-one contact with an individual can be entered into the Work Log.



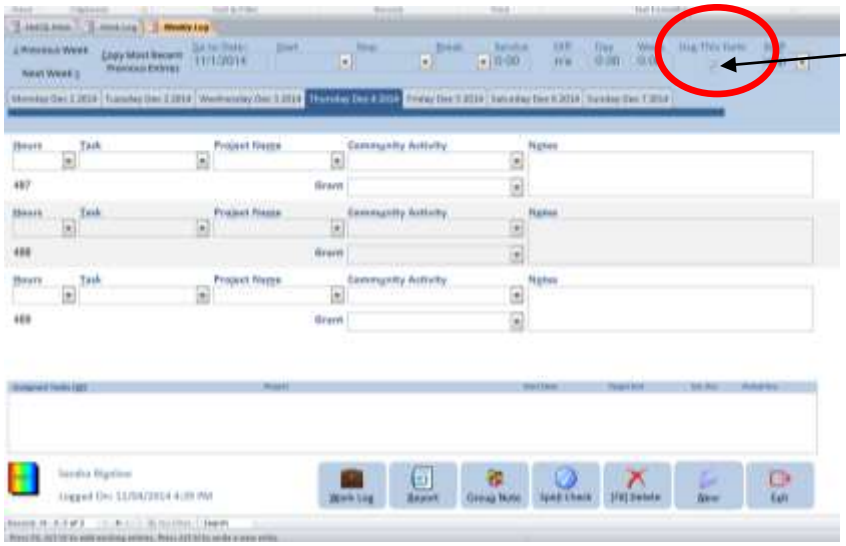
The Work Log can be used to record any activity by a staff member. The activity can be work performed for a group of people or an organization, or it can simply be a log of general work. Use the Work Log to record activities such as:

- Group trainings and Family to Family trainings
- Parent group meetings and associated work
- Outreach activities
- Meetings and conference calls
- Newsletters, or articles in others' newsletters, with # of distribution

Carol Coordinator says, "Keep a supply of the paper version of the work log form handy to jot down activities then slip them in your file labeled "Enter in NetCIL". Keep them on or in your desk, padfolio, brief case, etc."

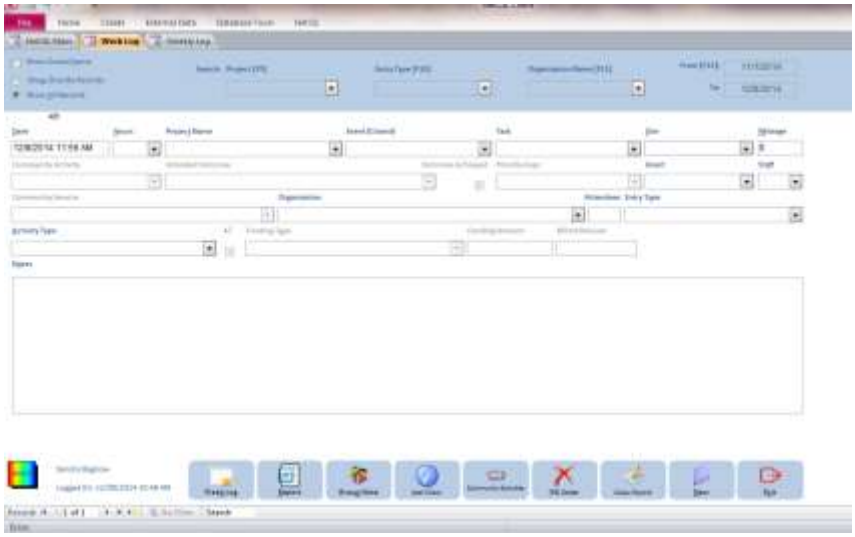
Weekly Log

The Weekly Log is a summary view of Work Log entries for the week.



Work Log

To search for an existing work log, begin by indicating applicable options such as if it is a closed form and whether the work log you want to find is one of your own records.



The Work Log opens to an existing entry, you must hit the New button on the bottom right to open a new log entry.

Each Work Log entry **must** include:

- **Date**
- **Notes** (concise and clear descriptive notes of the activity)

Wondering "What do I write as a description?"

Carol Coordinator says, "Follow K.I.S.S. – Keep It Short and Simple. Telling who, what, when, why, where and how works well. Generally 4-5 sentences is enough.

Use techniques like 'See project report for details,' or 'conference report attached'. Also, begin with action words like 'attended', 'presented', 'participated', etc."

Example: "ABC Agency Fair"

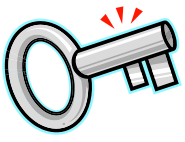
vs.

"Manned outreach table at ABC Agency Fair"

Example: "Attended the annual 'We Are Great' conference, and then this work log entry goes on and on and on taking up pages when the P2P Summary Report is printed……"

vs.

"Attended the annual 'We Are Great' conference, highlights were one or two things reported here. See conference report for full details." (The referenced conference report could be your notes typed into a Microsoft Word document and submitted to your supervisor.)



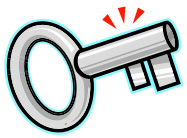
Hit the "F3" on the keyboard to unlock the record for editing.

To appear in the **P2P Summary Report**, each entry **must** also include:

- **Grant**
- **Activity Type**
  - If activity type is Workshop then **Project Name, Hours,** and **Attendees** are required also.

May also include:

- Hours
- Attendees
- Project Name
- Event
- Organization
- Entry Type



Save is automatic! If you made an error and decide you do not want the changes saved, hit the **Esc** key on the keyboard prior to exiting the record.

3.1 Activity Types

Only Work Log entries with one of the following activity types will appear in the P2P Summary Report.

Accomplishment – points out an activity which cannot be entered any other way but is worthy of mention in the statewide report to funders or documents work on an objective in the activity plan.

- An opportunity to highlight an activity that is an example of the good Parent to Parent of New York State does.
- The place for a "brag & share".
- Not required each month, but is an opportunity each month if your office is on a roll.
- Can be used to summarize work that may have been entered through a series of entries without an activity type. Good way to showcase an ongoing effort.
- Although finally getting the bulletin board changed or the files cleaned out sure can feel like a personal accomplishment, it is not something we would be bragging to our funders about.

Challenge – to highlight difficulties faced by the office which have not been documented any other way.

- An opportunity to highlight matters needing attention at your office or trends/needs which we may want to bring to the attention of funders, etc.
- It is not required to identify a challenge each month, however, if that is the case use this opportunity to do so.

Collaboration/Networking - working in conjunction with another organization on a common objective and/or forming business connections and contacts through social interactions.

- Speaking with a co-worker is NOT collaboration. (However, there may be "cross-grant" exceptions.)

Community/Systems Advocacy - An activity that supports or encourages positive change in the community or systems in the community. (An example is when a coordinator is asked to sit on a task force or advisory board.)

Outreach Efforts - An activity performed with the purpose of making others aware of P2P services in hopes of gaining requests that result in the delivery of countable "units of service" or other reportable activities.

- Only give activity type to the actual presentation, fair, etc. If entries are made for activities performed in preparation, they should not be given an activity type.

Parent Groups - Work associated with holding Parent to Parent sponsored parent group meetings for the purpose of disseminating information or to meet an objective in the strategic plan.

- Use for support group meetings, Support Parent Training, or for a presentation to a group of parents which is not one of the approved Workshop curriculums.
- Use with Group Case Notes to capture grant, time and service for each parent in attendance.
- Must follow an agenda/topic if Group Case Notes are to be used to claim grant, time and service.
- Use with Projects and Events to monitor parent group work is encouraged
- Use of the paper helper *Parent Group Meeting Record* is encouraged. It can serve as the sign-in sheet for the meeting and is a guide for making the entry in NetCIL.

Professional Development – Training either sponsored by Parent to Parent of New York State or other entities which enhances the skills an employee uses in their job at Parent to Parent. (Trainings an employee has participated in at the request of or with permission from their supervisor.)

Quarterly Satisfaction Survey and Evaluation – used to record when quarterly evaluations were distributed to those we have served. (See separate instructions detailing how to do these.)

Staff Meeting- When co-workers unite in person or via technology at a pre-planned time to cover work-related information included in a pre-planned agenda.

Support Parent Recognition – use to recognize a Support Parent once each quarter. Entry must include the Support Parent's name, mailing address, and one or two sentences telling why they were nominated for the recognition. If there is no recognition this time, enter a sentence stating there is none this quarter.

Workshops - A group learning event with defined objectives presented by Parent to Parent of New York State **for a specially coded Project** and presented with supervisor's approval. Workshops will 20 or less attendees now need to have Group Case Notes without time, grant or service. Some special considerations apply.

A single activity may require multiple Work Log entries with different activity types -- such as, Outreach, Collaboration/Networking, and Workshop.

Work Log WITH Activity Type = P2P Summary Report

P2P Summary Report = Result Oriented

Work Log WITHOUT Activity Type will still appear in:

- Work Log Report
- Project Report
- Event Report

If multiple people in the same office attended the same activity, one entry can be made instead of each person entering the same information. Make sure the single entry names all who participated in the activity.

3.2 Workshops

Work Log entries should only be given the Activity Type of "Workshop" if the activity was:

- A group learning event with defined objectives
- Presented by Parent to Parent of New York State
- Presented with supervisor's approval
- For one of the following specially coded Projects:

    - FORUM – Affordable Care Act
    - FORUM – Autism Insurance
    - FORUM – Family Caregiving
    - FORUM – Fathers
    - FORUM – Financial
    - FORUM – Transition
    - WORKSHOP – Education Record Keeping and Regulations
    - WORKSHOP – F2F – Advocacy Skills & Techniques
    - WORKSHOP – F2F – Healthy Transitions
    - WORKSHOP – F2F – Parent-Professional Collaboration
    - WORKSHOP – Families & People w Dis: Sharing Our Stories
    - WORKSHOP – Health Care Notebook
    - WORKSHOP - Housing Options
    - WORKSHOP – Individualized Health Plan
    - WORKSHOP – Letter Writing and Communication Skills
    - WORKSHOP - MSC – Families Workshop
    - WORKSHOP - MSC – Partnerships Workshop
    - WORKSHOP – MSC - Understanding OMRDD Services
    - WORKSHOP – PTIC Understanding Special Education
    - WORKSHOP - Tools for Inclusion – Using ABCD

    NOTE: Capital District office may have additional workshop projects to accommodate PTIC reporting

<u>GROUP CASE NOTES REQUIRED</u> for workshops presented with 20 or less attendees from your region. These case notes cannot have time, service or grant--they are only to record who attended.

Carol Coordinator says, "Remember, backup documentation is required for each workshop. Using the paper helper *Record of Workshop Held* is one way to provide the required backup documentation, including the sign-in sheet."

3.3 Entry Types (Do not appear in the P2P Summary Report)

The use of Entry Types is optional for Parent to Parent of New York State and include:

Administration - Work associated with management of the organization.

Funding - Tasks associated with maintaining the organization's funding.

Other – Work that will not fit into any Activity Type or any other Entry Type.

Preparation – used for work done in preparation of activity which does not need to appear in the P2P Summary Report.

For those who wish to keep all their notes in NetCIL, entries written for work performed to prepare for a workshop or outreach event should NOT be given any activity type. These entries can, however, be given the Entry Type of "Preparation". They can also be associated with a Project and/or an Event.

Carol Coordinator says, "Parent to Parent does not require a 'paperless office'. It's okay to keep paper notes and folders while pulling an activity together and write the required work log once the activity has been completed. Either method of recordkeeping while following up on outreach and workshop leads is acceptable."

What Are Group Case Notes?

Group Case Notes are used with a Work Log entry in hybrid situations where a service is delivered in a group setting. Group Case Notes are addressed in the section covering Case Notes.